

Island County Transportation Plan

Preliminary Population and Employment Analysis
Island County

Island County Land Use Workshop #1
December 10, 2013

Agenda

- Island County Population
- Preliminary Population Allocations
- Island County Employment Trends
 - Population to employment ratios
 - Employment Data Sources
 - Commute flows
- Discussion: Key Questions for Land Use Workshops
- Next Steps

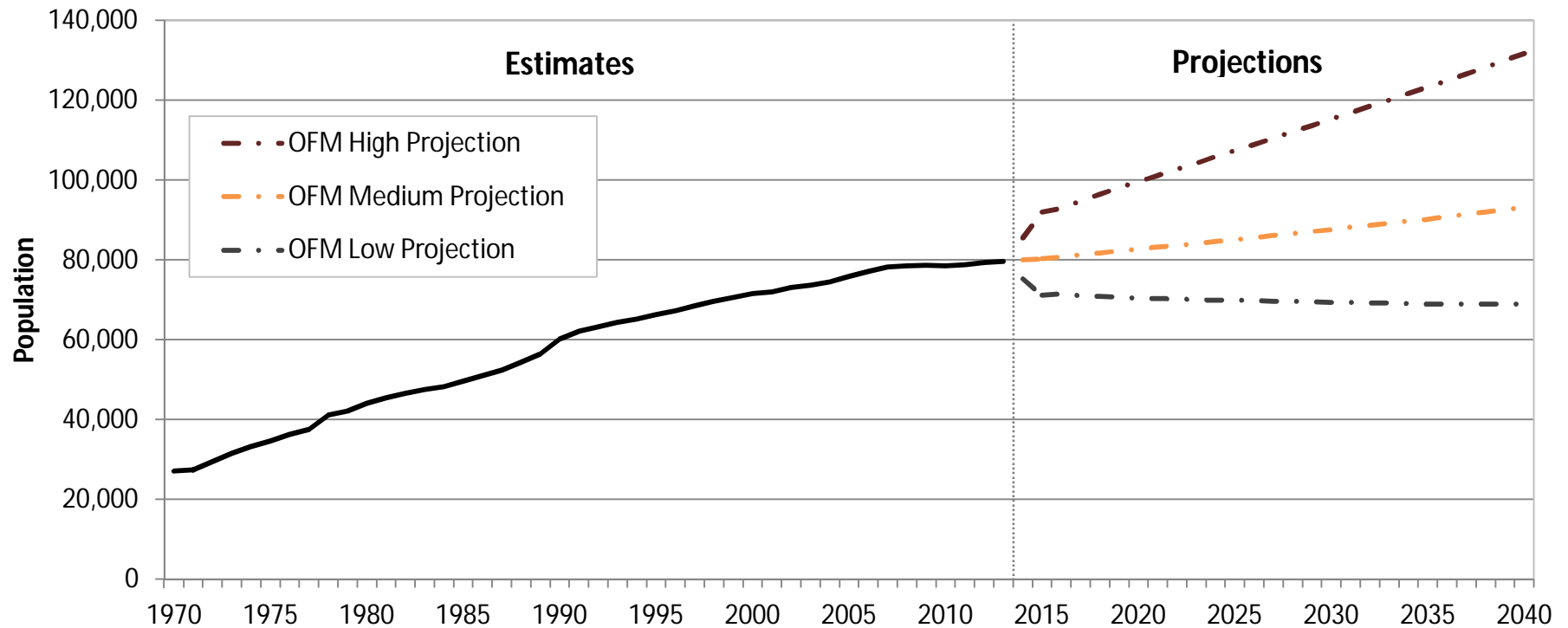
Population Growth

Where is Island County Now?

- Island County Planning and Community Development Produced 2036 County Pop. Estimate that differed from OFM medium
- Island County BOCC Adopted 2036 population forecast by resolution on August 26
- **PRELIMINARY** Regional Population Allocations Have been developed

Population Growth

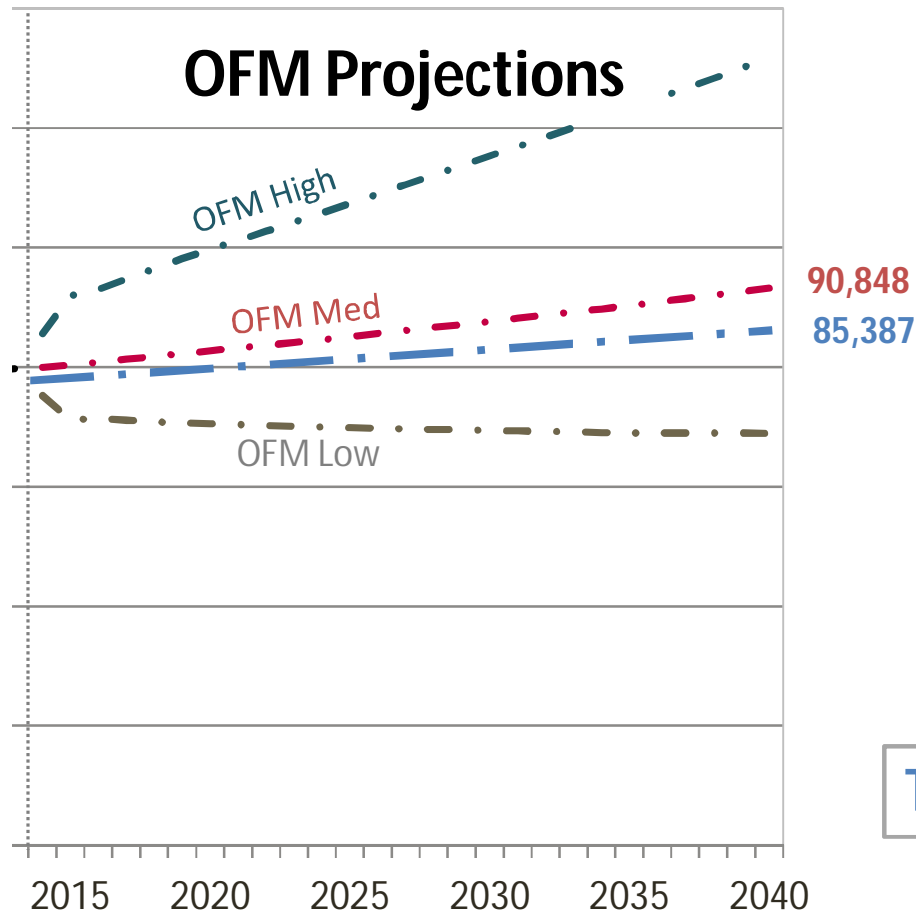
Island County Population, 1970-2040 and OFM Projections



Source: Office of Financial Management, historical Data and May 2012 projections.

Population Growth

2036 Island County Population Projections OFM Projections



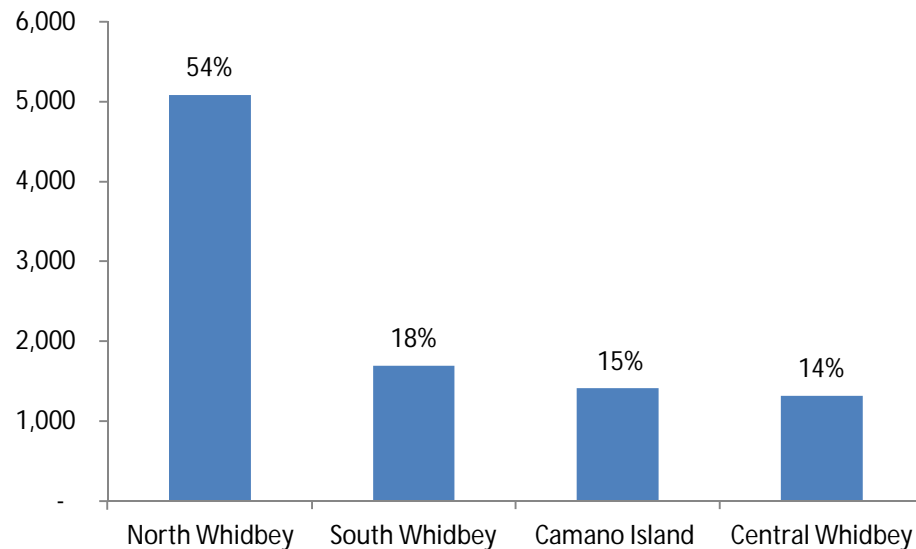
- Differed from OFM Medium
- 98' and 05' Projections were overestimates
- Drop in total Fertility Rates
- Historical (30 yr.) growth rate decline
- Reduction in expected retirees and off-Island commuters moving to County
- 2,530 additional military personal and families

Total 2036 County Forecast = 87,917

Population Allocation

Planning Area Split

Share of Projected Growth by Planning Area

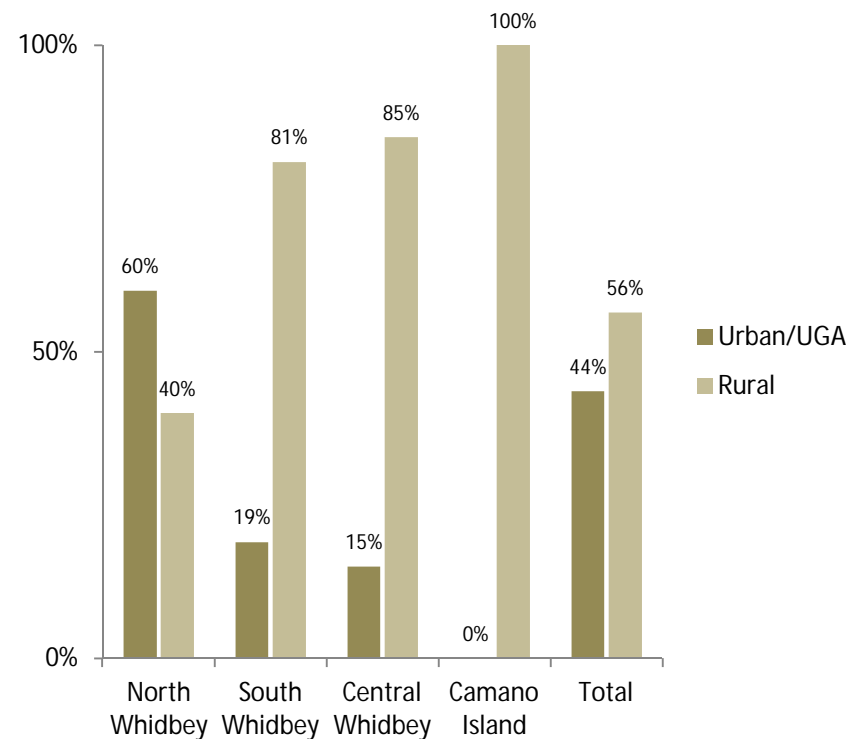


- Total forecasted 2036 population is 87,917
- Includes 2,530 Service People and Families
- General Growth follows past trends within planning areas
- Growth trends in planning area have been consistent over past 40 years

Population Allocation

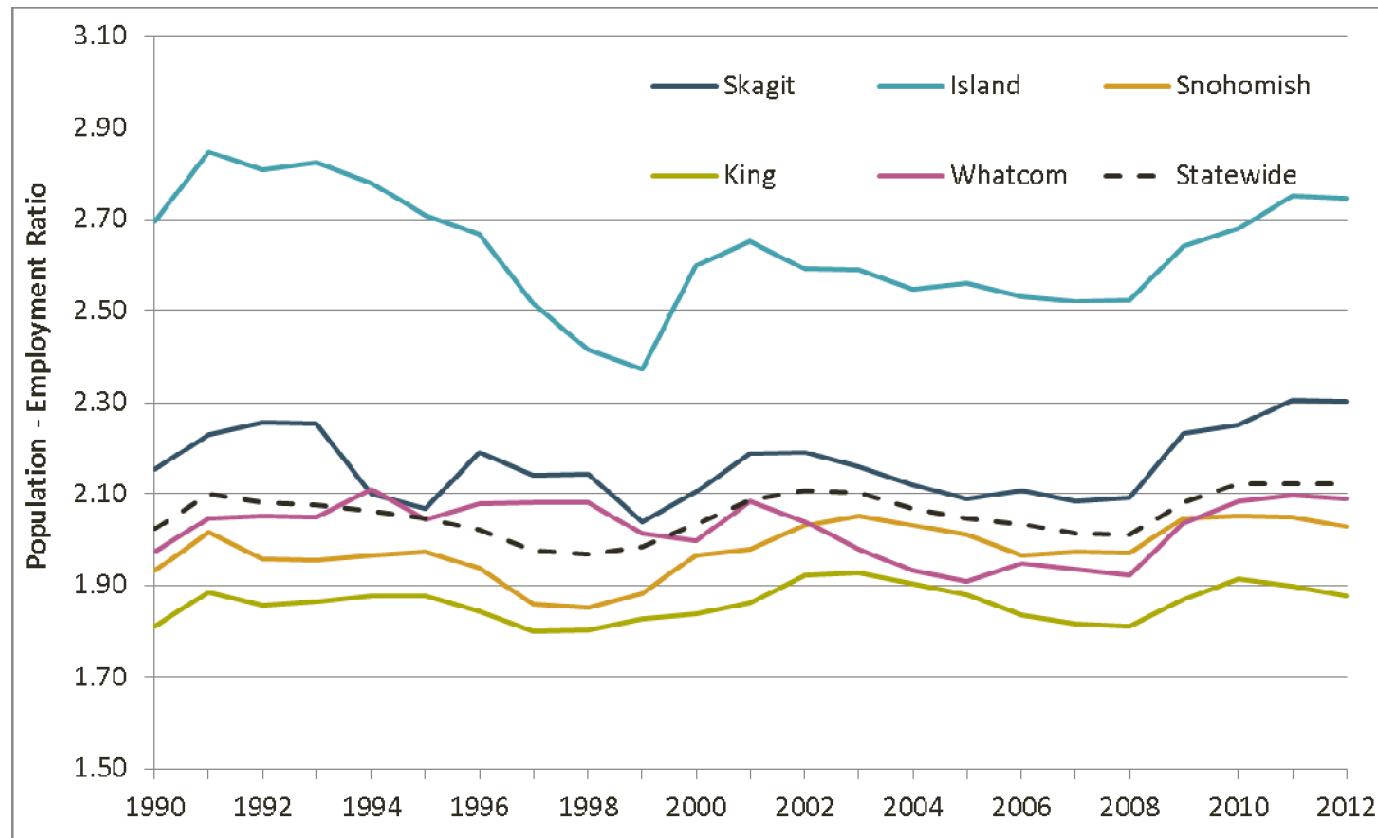
Urban/Rural Split

Planning Area	Urban/ UGA	Rural
North Whidbey	3,739	2,493
South Whidbey	230	981
Central Whidbey	149	842
Camano Island	-	1,018
Total	4,118	5,333



Population to Employment Ratios

BY SELECTED COUNTIES



Source: OFM Long-term Forecast of the Washington Labor Force, March 2013; ESD Local Unemployment Statistics, 2013.

- Island County has a significantly higher population-employment ratio than the State overall.

Population to Employment Ratios

COMPARISONS TO WASHINGTON STATE

		Historical Estimates			Projections		
		1990	2000	2010	2020	2030	2040
Washington State	Population	4,866,659	5,894,121	6,724,540	7,411,977	8,154,193	8,790,981
	Total Employed	2,406,440	2,898,680	3,166,880	3,456,200	3,657,100	3,904,300
	Population-Employment Ratio	2.02	2.03	2.12	2.14	2.23	2.25
Skagit County	Population	79,545	102,979	116,901			
	Total Employed	36,910	48,910	51,910			
	Population-Employment Ratio	2.16	2.11	2.25			
Island County	Population	60,195	71,558	78,506			
	Total Employed	22,330	27,530	29,310			
	Population-Employment Ratio	2.70	2.60	2.68			

Source: OFM Long-term Forecast of the Washington Labor Force, March 2013; ESD Local Unemployment Statistics, 2013.

- Historical relationships to statewide averages can inform employment projections
- Total employment can be estimated by assuming reasonable changes in the population-employment ratio.

Population to Employment Ratios

COMPARISONS TO OTHER COUNTIES

County	Population-Employment Ratio	
	2000	2010
Skagit	NA	2.34
King	1.38	1.63
Kitsap	2.44	2.58
Pierce	2.45	2.50
Snohomish	2.49	2.66

Source: Puget Sound Regional Council Land Use Baseline, 2013; BERK, 2013

Employment by UGA

STATUS ON GEOCODING EFFORTS - SCOG

City/Town/Area	Two-digit NAICS Code																								Total
	11	21	22	23	31	32	33	42	44	45	48	49	51	52	53	54	55	56	61	62	71	72	81	92	
Oak Harbor+UGA																									
Employers	*	*	3	27	*	*	9	8	50	27	5	*	8	27	36	28	*	30	8	67	7	60	158	4	567
Employees	*	*	11	134	*	*	270	16	800	687	81	*	39	170	134	104	*	350	975	789	175	867	274	223	6201
Coupeville																									
Employers	*	*	*	7	*	*	*	*	5	*	*	*	3	3	6	6	*	*	*	19	*	17	23	*	107
Employees	*	*	*	14	*	*	*	*	53	*	*	*	7	16	24	21	*	*	*	815	*	181	37	*	1677
Langley+UGA																									
Employers	*	*	*	*	3	*	*	*	5	10	*	*	*	*	*	10	*	3	*	10	5	10	8	*	79
Employees	*	*	*	*	15	*	*	*	11	81	*	*	*	*	*	17	*	12	*	65	18	160	10	*	522
Freeland UGA																									
Employers	*	*	*	6	*	*	*	7	12	8	*	*	*	12	6	8	*	4	*	13	*	11	5	*	99
Employees	*	*	*	12	*	*	*	13	279	30	*	*	*	53	19	31	*	10	*	178	*	194	8	*	1069
Unincorporated Whidbey**																									
Employers	23	*	5	136	6	*	10	20	27	9	9	*	7	13	14	75	*	54	15	22	22	29	123	5	631
Employees	137	*	11	337	35	*	16	41	254	48	200	*	146	33	39	522	*	317	325	170	407	305	258	636	4271
Unincorporated Camano																									
Employers	4	*	4	40	*	*	3	15	9	3	4	*	4	*	3	12	*	9	*	7	5	3	55	*	189
Employees	12	*	10	78	*	*	31	22	129	11	13	*	5	*	13	31	*	39	*	63	68	29	63	*	835
Non-located***																									
Employers	5	*	3	22	*	*	5	15	13	10	*	*	5	8	9	24	*	8	11	13	6	6	69	11	249
Employees	15	*	8	68	*	*	6	33	63	27	*	*	11	46	9	52	*	22	33	48	19	20	108	26	626
Totals																									
Employers	32	*	18	239	14	*	30	69	121	68	20	7	29	65	75	163	3	110	42	151	49	136	441	27	1921
Employees	164	*	55	644	74	*	516	136	1589	886	300	90	215	324	242	778	62	757	1649	2128	719	1756	758	1319	15201

Notes: * Data suppressed; **Outside of all cities, towns and associated UGAs; ***Employers' locations could not be determined due to address reporting errors

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2nd Quarter of Calendar Year 2012

Two-digit NAICS Code Descriptions

11 - Agriculture, Forestry, Fishing and Hunting
 21 - Mining, Quarrying, and Oil and Gas Extraction
 22 - Utilities
 23 - Construction
 31 - Manufacturing
 32 - Manufacturing
 33 - Manufacturing
 42 - Wholesale Trade
 44 - Retail Trade
 45 - Retail Trade
 48 - Transportation and Warehousing
 49 - Transportation and Warehousing

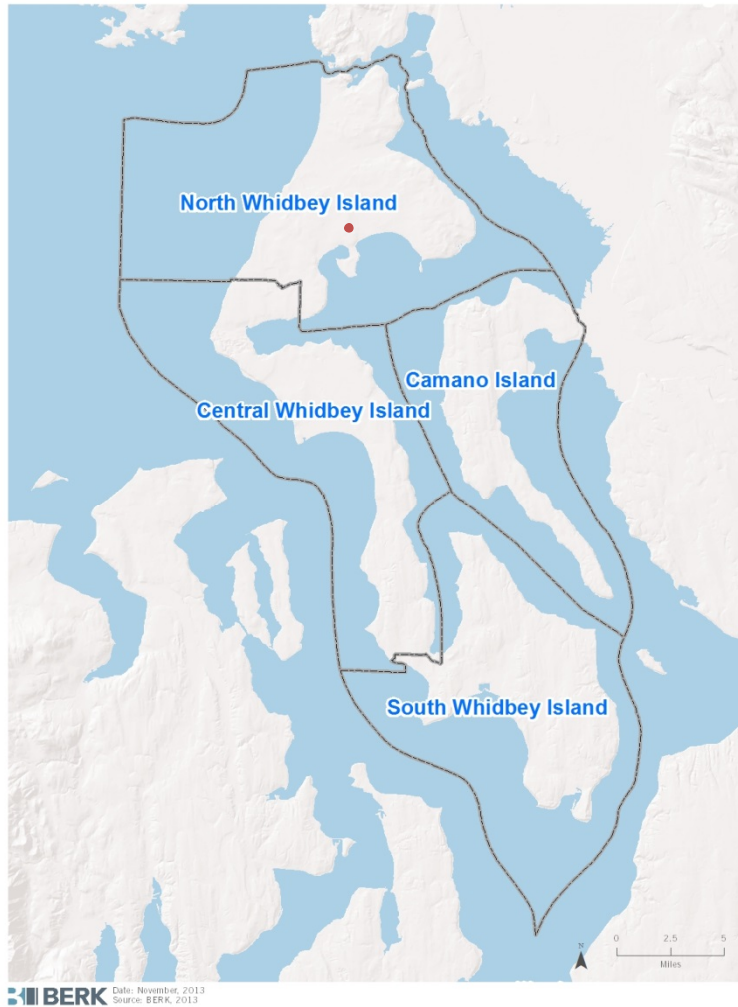
51 - Information
 52 - Finance and Insurance
 53 - Real Estate and Rental and Leasing
 54 - Professional, Scientific, and Technical Services
 55 - Management of Companies and Enterprises
 56 - Administrative and Support and Waste Management and Remediation Services
 61 - Educational Services
 62 - Health Care and Social Assistance
 71 - Arts, Entertainment, and Recreation
 72 - Accommodation and Food Services
 81 - Other Services (except Public Administration)
 92 - Public Administration



DRAFT

12/9/2013

Island County Commute Flows

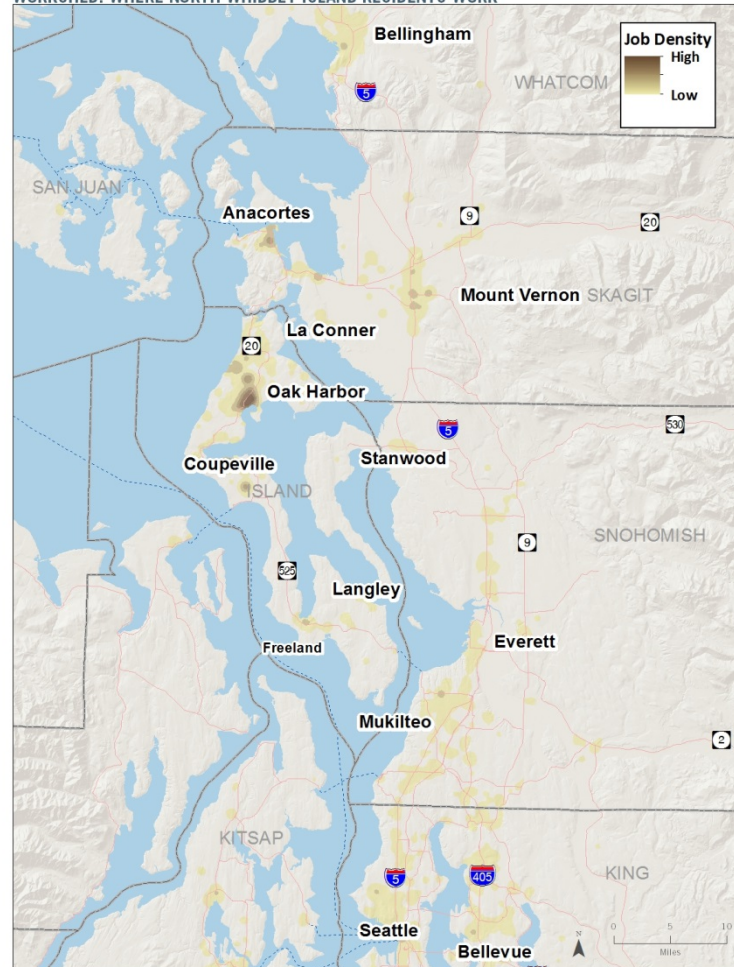


- Four County Planning Areas

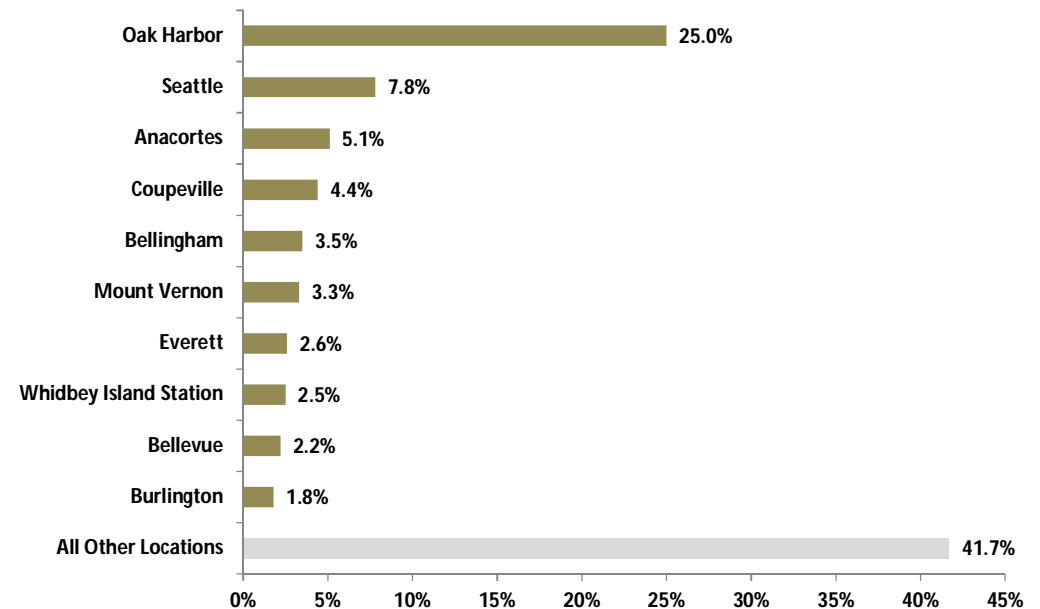
Island County Commute Flows

North Whidbey Island

WORKSHED: WHERE NORTH WHIDBEY ISLAND RESIDENTS WORK



Where North Whidbey Island County Residents Work, 2011



Source: LEHD, 2013.

Island County Commute Flows

Where North Island County Residents Work, 2002 - 2011

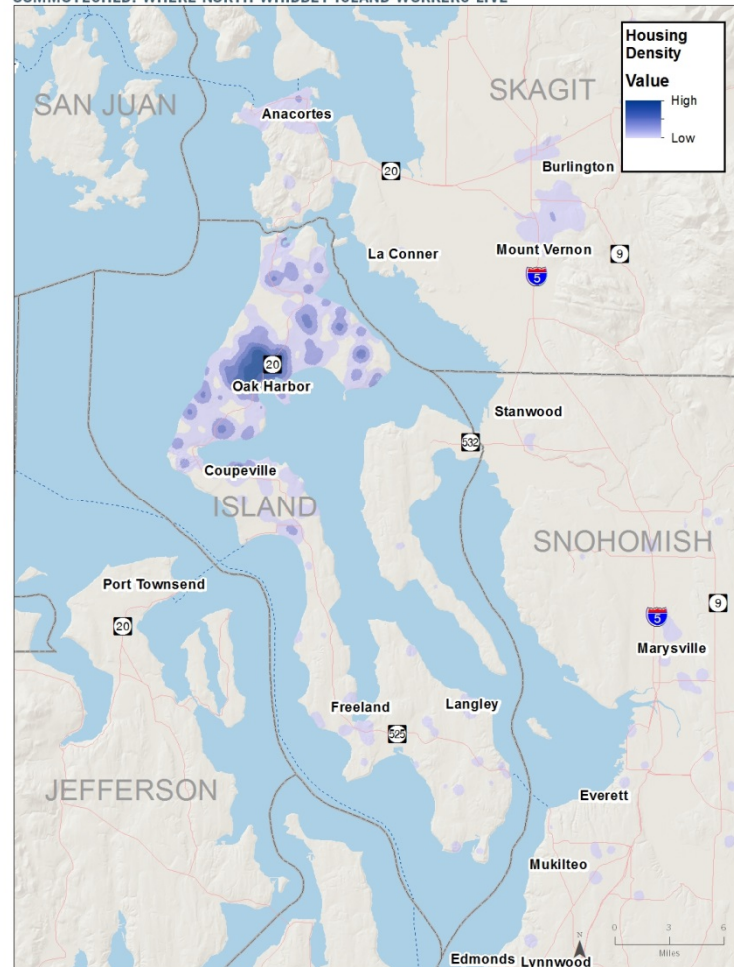
Place	Primary Jobs		Share of Primary Jobs		Change of Share 02' - 11'
	2002	2011	2002	2011	
Oak Harbor	2,563	2,534	37%	25%	-11.7%
Seattle	226	795	3%	8%	4.6%
Anacortes	308	518	4%	5%	0.7%
Coupeville	441	448	6%	4%	-1.9%
Bellingham	232	354	3%	4%	0.2%
Mount Vernon	232	330	3%	3%	0.0%
Everett	86	265	1%	3%	1.4%
Whidbey Island Station	160	254	2%	3%	0.2%
Bellevue	74	227	1%	2%	1.1%
Burlington	95	185	1%	2%	0.4%
All Other Locations	2,558	4,229	37%	42%	5.0%
Totals	6,975	10,139	100%	100%	

Source: LEHD, 2013.

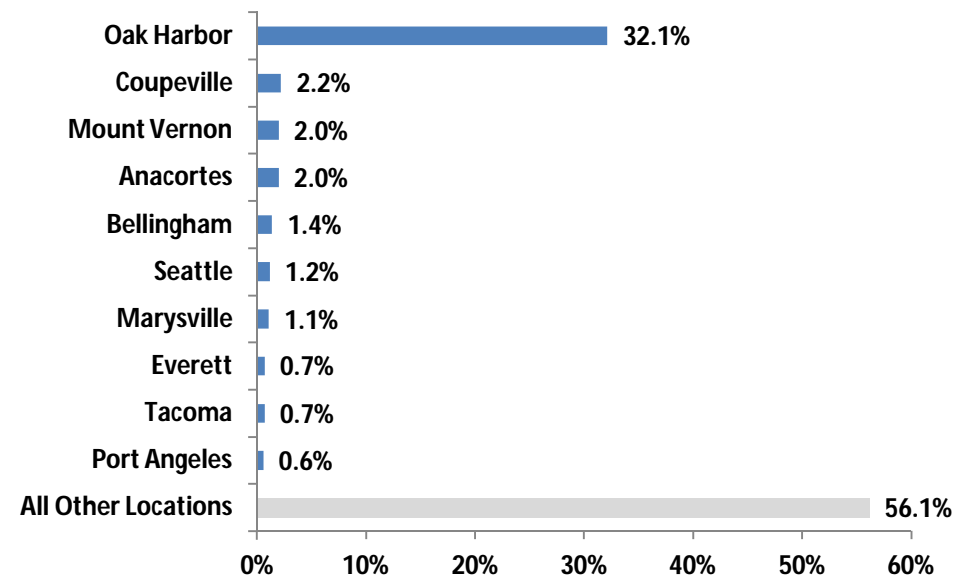
Island County Commute Flows

North Whidbey Island

COMMUTESHED: WHERE NORTH WHIDBEY ISLAND WORKERS LIVE














Where North Whidbey Island County Workers Live, 2011



Source: LEHD, 2013. Source: BERK, 2013.

Island County Commute Flows

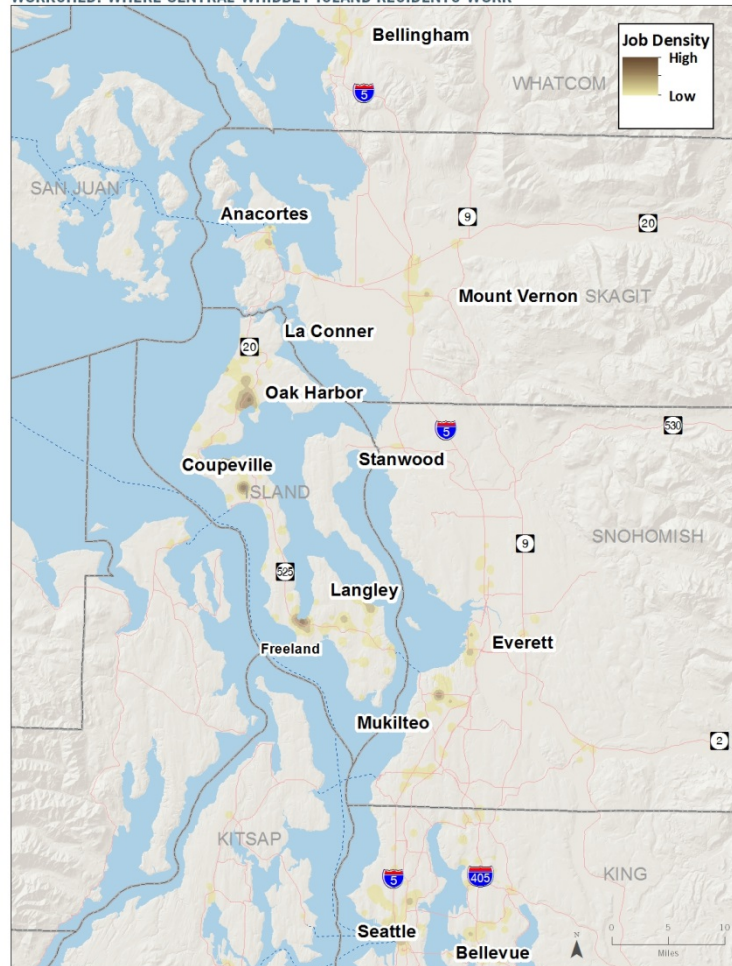
Where North Island County Workers Live, 2002 - 2011

Place	Workers		Share of Workers		Change in Share 02' - 11'	
	2002	2011	2002	2011		
Oak Harbor	1,845	1,915	32%	32%	0.4%	
Coupeville	94	134	2%	2%	0.6%	
Anacortes	180	119	3%	2%	-1.1%	
Mount Vernon	121	117	2%	2%	-0.1%	
Bellingham	100	82	2%	1%	-0.3%	
Seattle	60	69	1%	1%	0.2%	
Marysville	99	66	2%	1%	-0.6%	
Tacoma	0	41	0%	1%	0.7%	
Everett	18	39	0%	1%	0.4%	
Port Angeles	43	36	1%	1%	-0.1%	
All Other Locations	3,263	3,342	56%	56%	0.1%	
Totals	5,823	5,960	100%	100%		

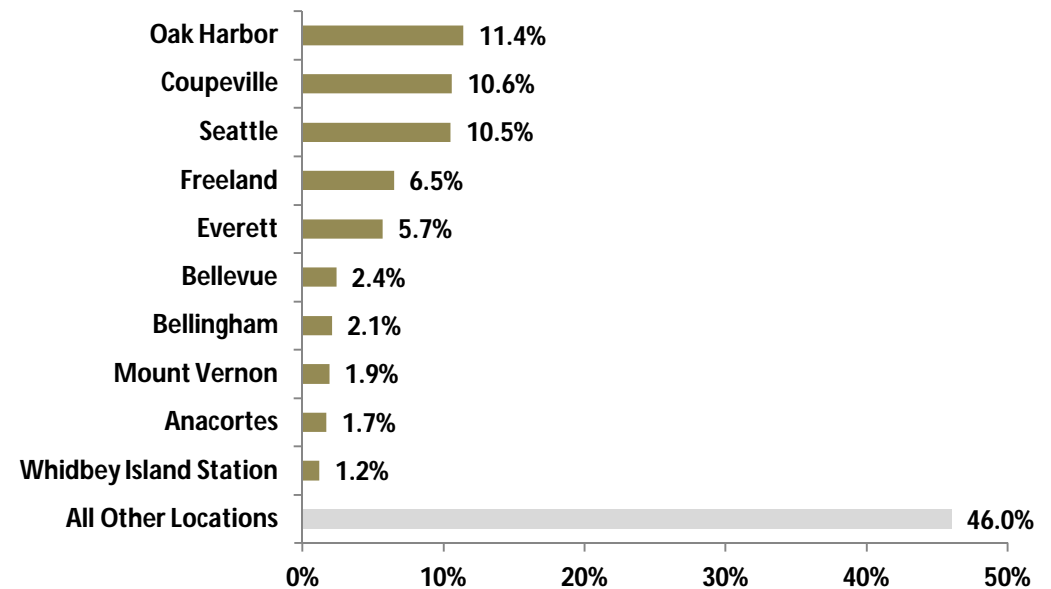
Island County Commute Flows

Central Whidbey Island

WORKSHED: WHERE CENTRAL WHIDBEY ISLAND RESIDENTS WORK



Where Central Whidbey Island County Residents Work, 2011



Source: LEHD, 2013. Source: BERK, 2013.

Island County Commute Flows

Where Central Island County Residents Work, 2002 - 2011

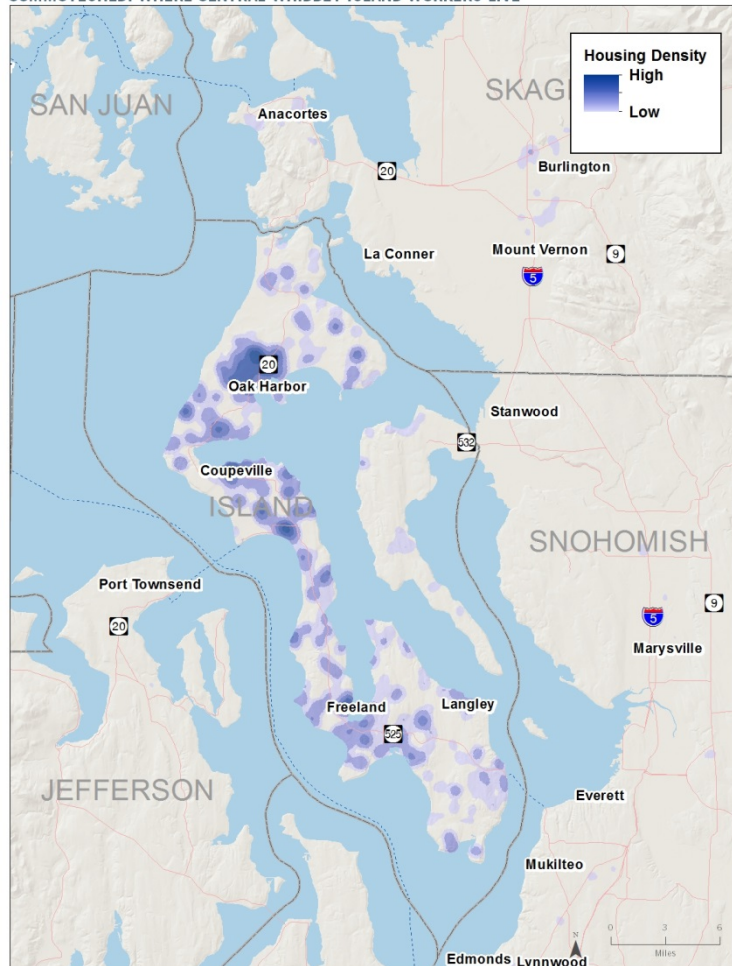
Place	Primary Jobs		Share of Primary Jobs		Change of Share 02' - 11'
	2002	2011	2002	2011	
Oak Harbor	298	444	14%	11%	-2.5%
Coupeville	295	410	14%	11%	-3.2%
Seattle	107	406	5%	11%	5.5%
Freeland	162	253	8%	7%	-1.1%
Everett	67	220	3%	6%	2.6%
Bellevue	26	92	1%	2%	1.2%
Bellingham	51	82	2%	2%	-0.3%
Mount Vernon	35	74	2%	2%	0.3%
Anacortes	33	67	2%	2%	0.2%
Whidbey Island Station	23	48	1%	1%	0.1%
All Other Locations	1,048	1,786	49%	46%	-2.9%
Totals	2,145	3,882			

Source: LEHD, 2013.

Island County Commute Flows

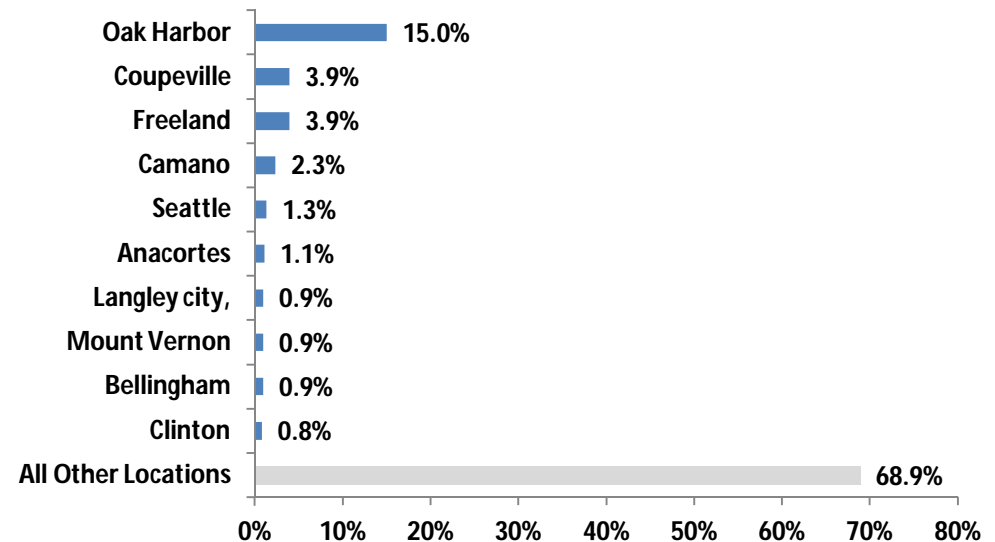
Central Whidbey Island

COMMUTESHED: WHERE CENTRAL WHIDBEY ISLAND WORKERS LIVE



BERK Date: November, 2013
Source: BERK, 2013











Where Central Whidbey Island County Workers Live, 2011



Source: LEHD, 2013. Source: BERK, 2013.

Island County Commute Flows

Where Central Island County Workers Live, 2002 - 2011

Place	Workers		Share of Workers		Change in Share 02' - 11'	
	2002	2011	2002	2011		
Oak Harbor	413	475	16%	15%	-0.6%	
Freeland	56	124	2%	4%	1.8%	
Coupeville	120	122	5%	4%	-0.6%	
Camano	75	72	3%	2%	-0.5%	
Seattle	35	42	1%	1%	0.0%	
Anacortes	64	35	2%	1%	-1.3%	
Bellingham	17	30	1%	1%	0.3%	
Mount Vernon	9	30	0%	1%	0.6%	
Langley city,	31	28	1%	1%	-0.3%	
Clinton CDP,	18	25	1%	1%	0.1%	
All Other Locations	1,808	2,177	68%	69%	0.6%	
Totals	2,646	3,160				

Island County Commute Flows

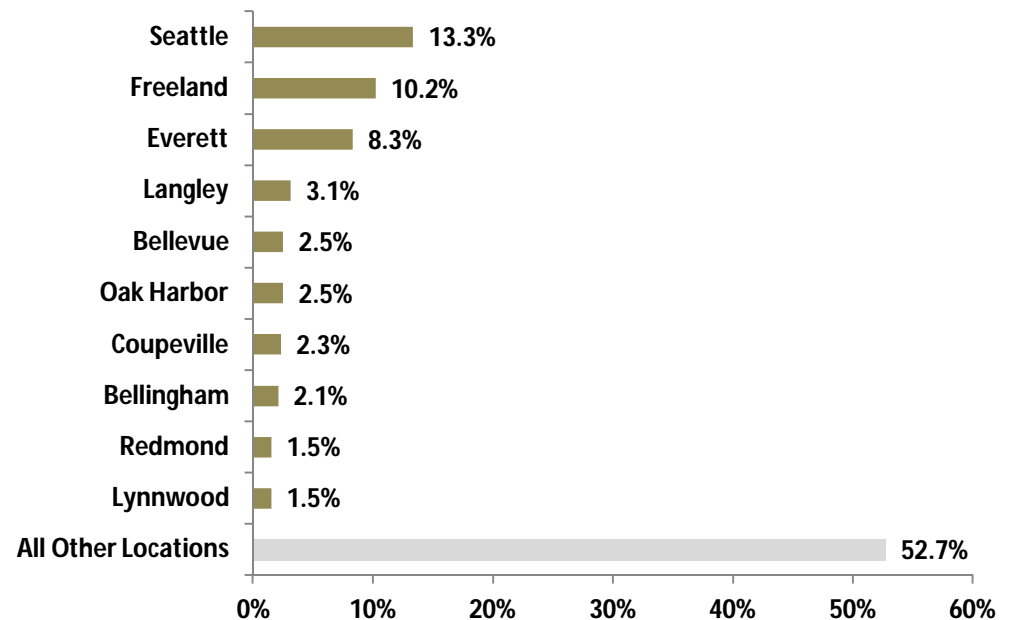
South Whidbey Island

WORKSHED: WHERE SOUTH WHIDBEY ISLAND RESIDENTS WORK



BERK Date: November, 2013 Source: BERK, 2013









Where South Whidbey Island County Residents Work, 2011



Source: LEHD, 2013. Source: BERK, 2013.

Island County Commute Flows

Where South Whidbey Island County Residents Work, 2002 - 2011

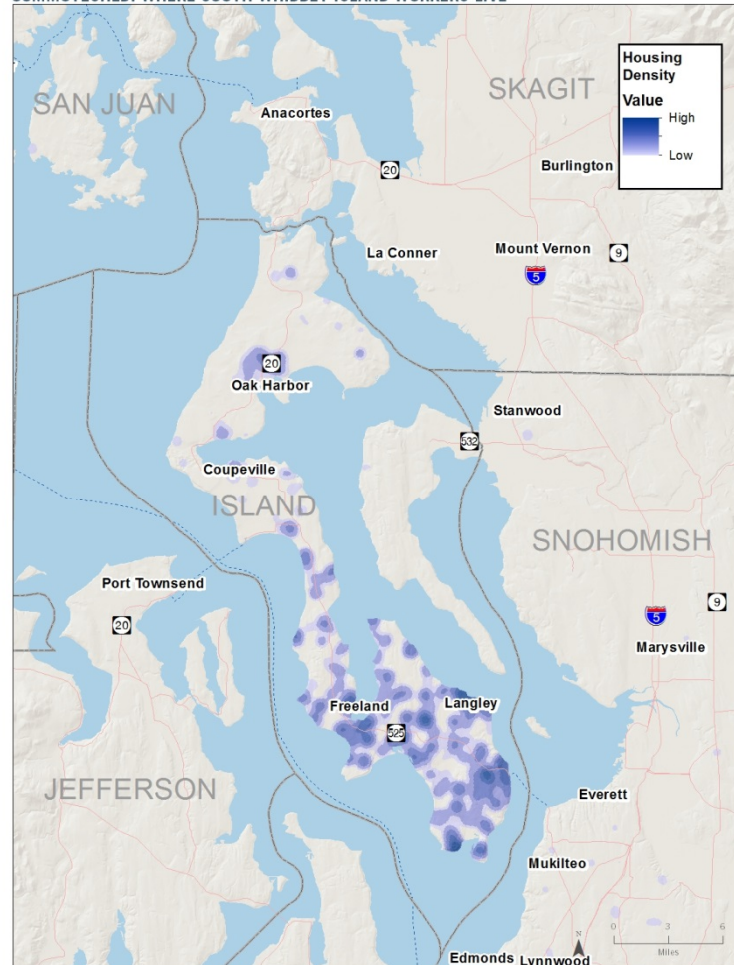
Place	Primary Jobs		Share of Primary Jobs		Change of Share 02' - 11'	
	2002	2011	2002	2011		
Seattle	202	637	8%	13%	5.7%	
Freeland	312	489	12%	10%	-1.6%	
Everett	175	398	7%	8%	1.7%	
Langley	220	147	8%	3%	-5.2%	
Oak Harbor	66	122	3%	3%	0.0%	
Bellevue	31	120	1%	3%	1.3%	
Coupeville	92	112	4%	2%	-1.2%	
Bellingham	13	103	1%	2%	1.6%	
Lynnwood	36	72	1%	2%	0.1%	
Redmond	26	71	1%	2%	0.5%	
All Other Locations	1,469	2,534	56%	53%	-2.9%	
Totals	2,642	4,805				

Source: LEHD, 2013.

Island County Commute Flows

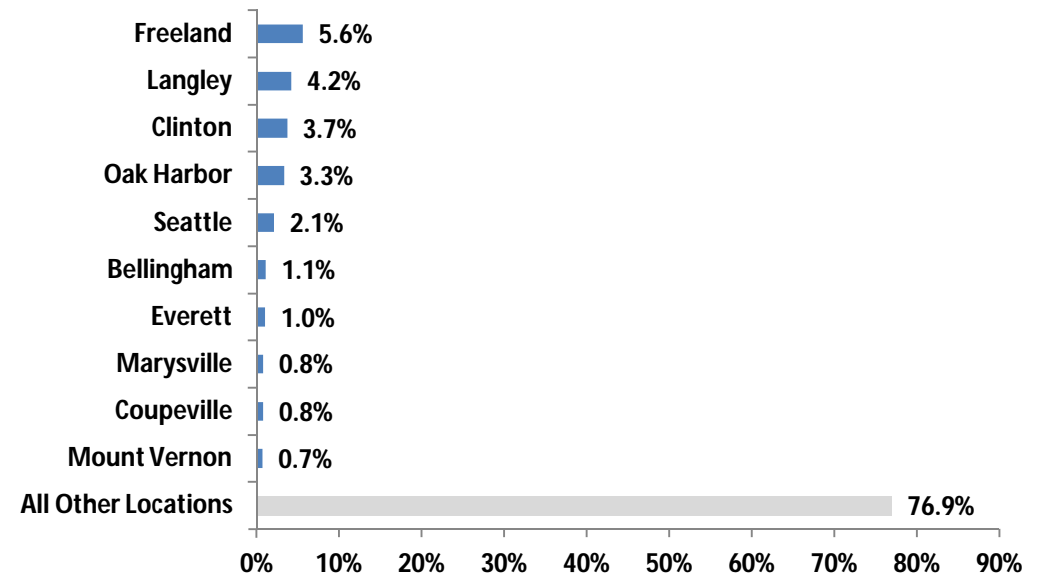
South Whidbey Island

COMMUTESHED: WHERE SOUTH WHIDBEY ISLAND WORKERS LIVE



BERK Date: November, 2013 Source: BERK, 2013










Where South Whidbey Island County Workers Live, 2011



Source: LEHD, 2013. Source: BERK, 2013.

Island County Commute Flows

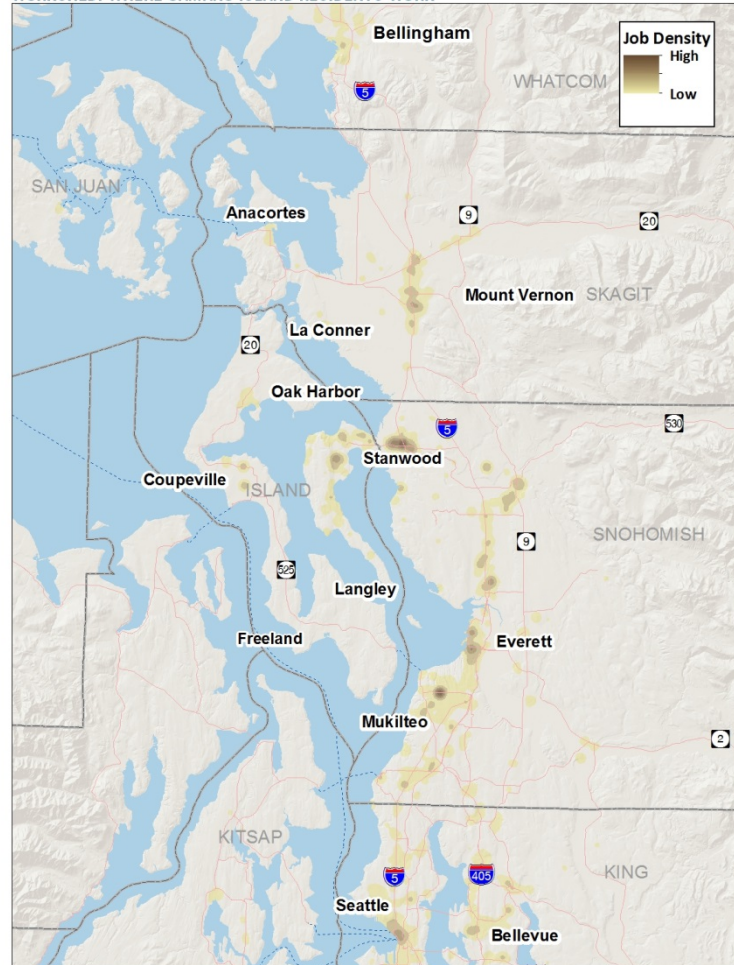
Where South Island County Workers Live, 2002 - 2011

Place	Workers		Share of Workers		Change in Share 02' - 11'	
	2002	2011	2002	2011		
Freeland	94	127	4%	6%	1.6%	
Langley	116	95	5%	4%	-0.7%	
Clinton	96	84	4%	4%	-0.4%	
Oak Harbor	89	75	4%	3%	-0.5%	
Seattle	66	47	3%	2%	-0.7%	
Bellingham	6	24	0%	1%	0.8%	
Everett	55	22	2%	1%	-1.3%	
Coupeville	16	18	1%	1%	0.1%	
Marysville	18	17	1%	1%	0.0%	
Mount Vernon	17	15	1%	1%	0.0%	
All Other Locations	1,788	1,742	76%	77%	1.2%	
Totals	2,361	2,266				

Island County Commute Flows

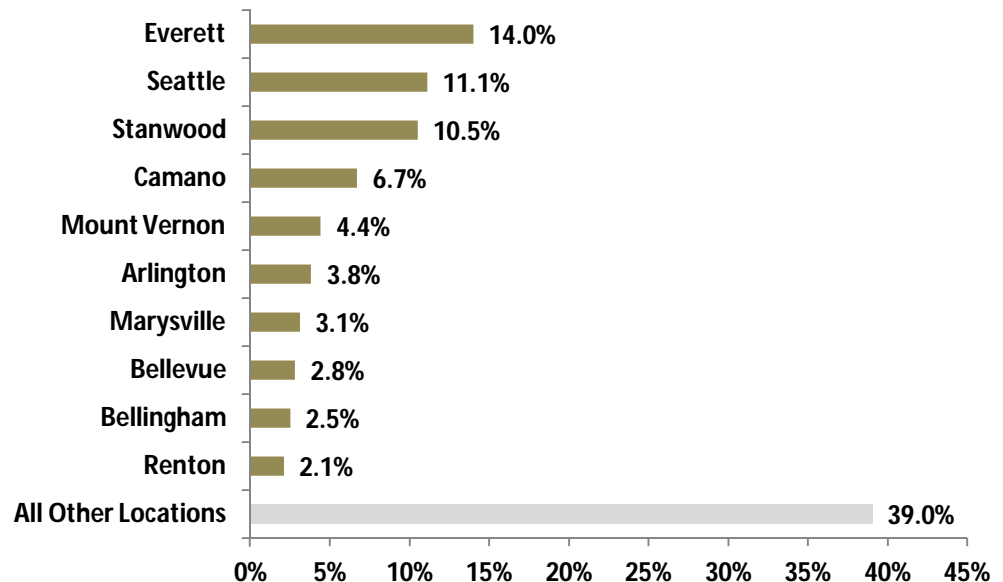
Camano Island

WORKSHED: WHERE CAMANO ISLAND RESIDENTS WORK



BERK
Date: November, 2013
Source: BERK, 2013












Where Camano Island Residents Work, 2011



Source: LEHD, 2013. Source: BERK, 2013.

Island County Commute Flows

Where Camano Island County Residents Work, 2002 - 2011

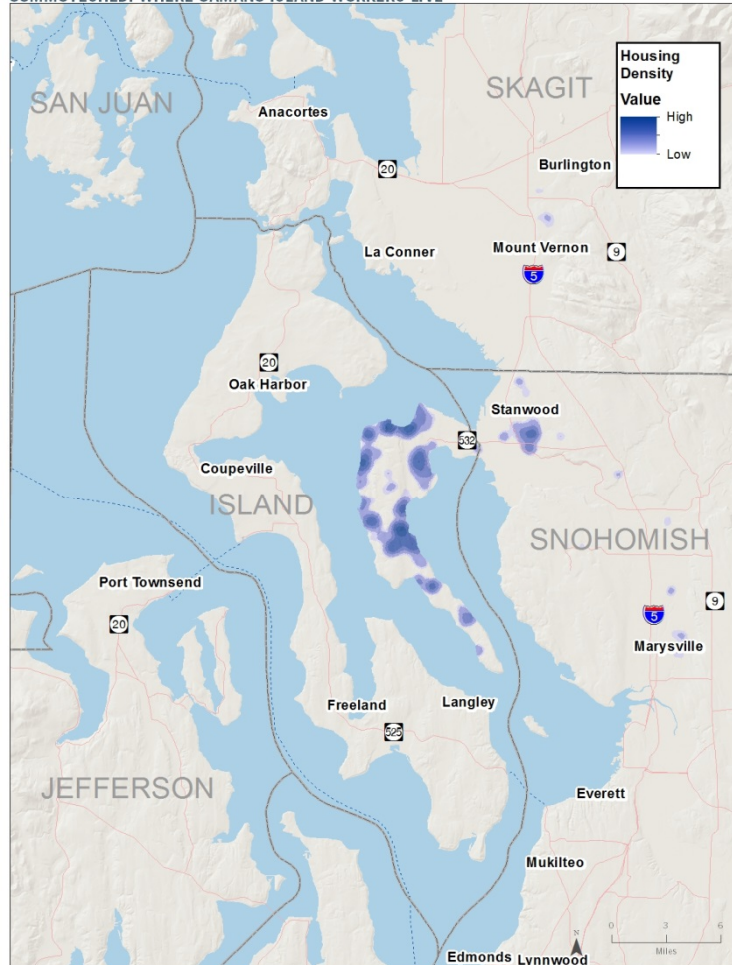
Place	Primary Jobs		Share of Primary Jobs		Change of Share 02' - 11'	
	2002	2011	2002	2011		
Everett	351	810	13%	14%	0.9%	
Seattle	263	644	10%	11%	1.2%	
Stanwood	367	608	14%	11%	-3.2%	
Camano	196	390	7%	7%	-0.6%	
Mount Vernon	108	254	4%	4%	0.4%	
Arlington	166	220	6%	4%	-2.4%	
Marysville	81	177	3%	3%	0.1%	
Bellevue	46	160	2%	3%	1.1%	
Bellingham	72	145	3%	3%	-0.2%	
Renton	16	120	1%	2%	1.5%	
All Other Locations	1,004	2,259	38%	39%	1.4%	
Totals	2,670	5,787				

Source: LEHD, 2013.

Island County Commute Flows

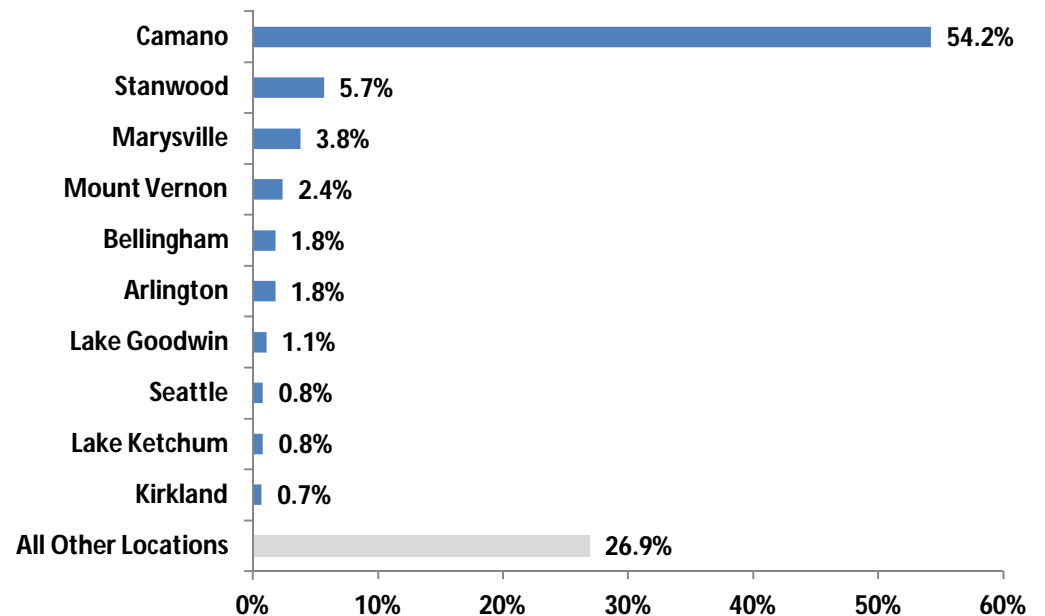
Camano Island

COMMUTESHED: WHERE CAMANO ISLAND WORKERS LIVE



BERK Date: November, 2013
Source: BERK, 2013












Where Camano Island County Workers Live, 2011



Source: LEHD, 2013. Source: BERK, 2013.

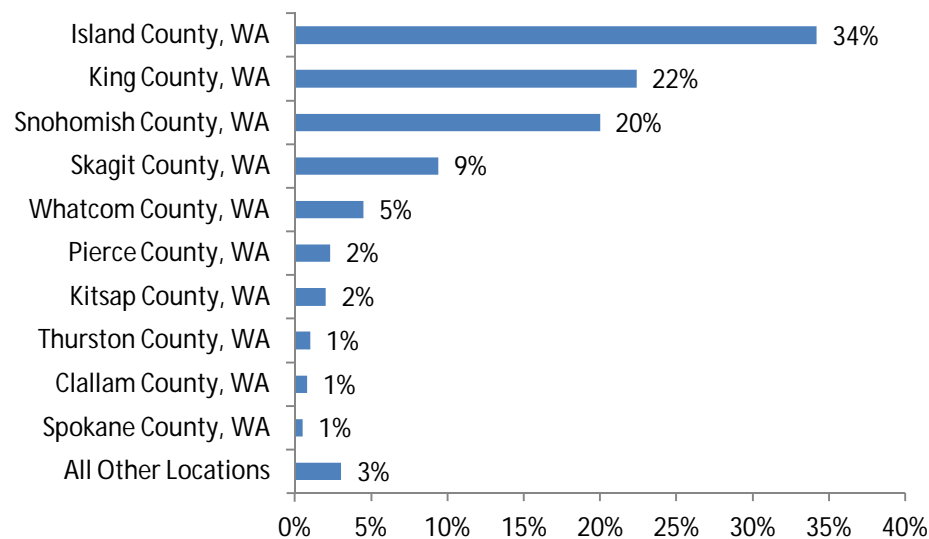
Island County Commute Flows

Where Camano Island County Workers Live, 2002 - 2011

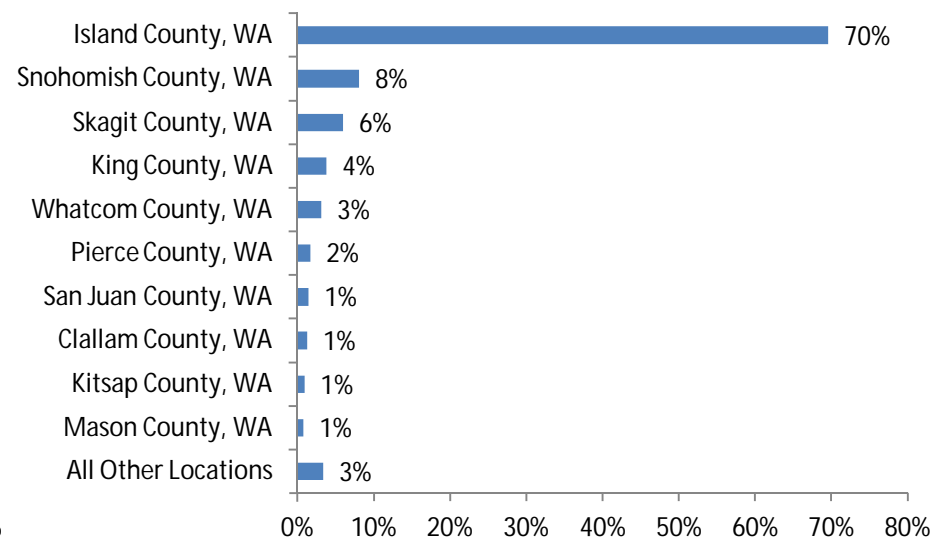
Place	Workers		Share of Workers		Change in Share 02' - 11'	
	2002	2011	2002	2011		
Camano	196	390	44%	54%	10.1%	
Stanwood	16	41	4%	6%	2.1%	
Marysville	26	27	6%	4%	-2.1%	
Mount Vernon	11	17	3%	2%	-0.1%	
Arlington	7	13	2%	2%	0.2%	
Bellingham	4	13	1%	2%	0.9%	
Lake Goodwin	3	8	1%	1%	0.4%	
Lake Ketchum	3	6	1%	1%	0.1%	
Seattle	2	6	1%	1%	0.3%	
Kirkland	0	5	0%	1%	0.7%	
All Other Locations	176	194	40%	27%	-12.7%	
Totals	444	720				

Island County Commute Flows

Where Island County Residents Work, 2011



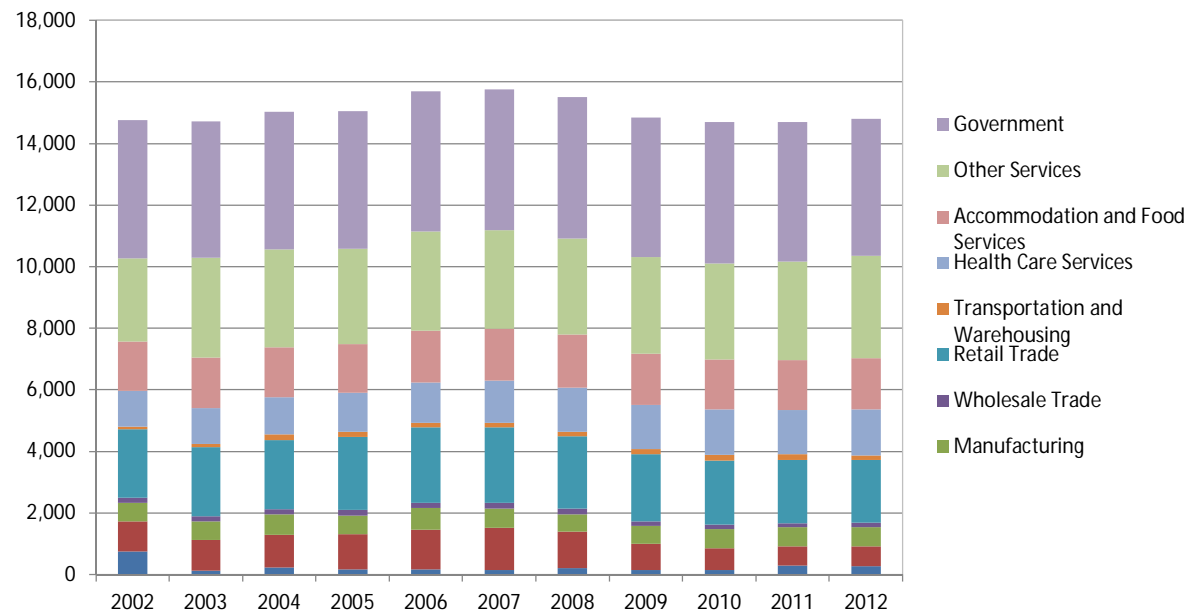
Where Island County Workers Live, 2011



Employment by Industry – Island County

Island County Covered Employment by Industry, 2002-2012

NAICS	Industry	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
11, 21-22	Resources and Utilities	759	140	242	163	170	160	218	158	155	296	280
23	Construction	966	980	1,061	1,146	1,293	1,362	1,174	852	710	617	634
31-33	Manufacturing	604	618	663	615	698	626	578	571	617	622	632
42	Wholesale Trade	173	166	164	174	176	176	177	147	132	141	144
44-45	Retail Trade	2,224	2,227	2,248	2,388	2,438	2,452	2,345	2,183	2,083	2,040	2,044
48-49	Transportation and Warehousing	71	118	179	158	162	159	150	164	198	189	145
62	Health Care Services	1,176	1,154	1,207	1,267	1,307	1,371	1,426	1,439	1,481	1,436	1,483
72	Accommodation and Food Services	1,590	1,647	1,621	1,587	1,687	1,673	1,732	1,666	1,625	1,626	1,665
51-61, 71, 81	Other Services	2,712	3,232	3,173	3,094	3,210	3,213	3,109	3,132	3,111	3,202	3,332
	Government	4,484	4,447	4,469	4,456	4,567	4,577	4,611	4,527	4,597	4,537	4,451
	Total	14,759	14,729	15,027	15,048	15,708	15,769	15,520	14,839	14,709	14,706	14,810



Source: ESD, 2013.
Note: 2012 data is preliminary.

Employment Projection Alternatives

What alternative Countywide projections, if any, does Island County want to consider?

- Link employment forecast to population forecast with population-employment ratio – assume an increase, decrease, relative to statewide projected ratio
- Variations on Population-employment ratios: low, medium, high
- Use different assumptions about major economic drivers in each county – e.g. emerging industry clusters, military facilities
- Revisit the discussion of ranges and how to vary population and employment in alternatives – planning area or urban rural splits

Key questions for land use workshops

- What are the issues you want to look into further for the next land use workshop?
 - Unique economic or demographic trends
 - Emerging industry clusters
 - UGA-specific issues
 - Urban/rural split

Next Steps

Next Island County Land Use Workshop – 1/15

